

IN THIS ISSUE

WICHE's *Changing Direction: Integrating Higher Education Financial Aid and Financing Policy* project examines how to structure financial aid and financing policies and practices to maximize participation, access, and success for all students. The multiyear project is designed around an integrated approach to restructuring appropriations, tuition, and financial aid policies and practices and examines the socioeconomic-political environment in order to foster the kinds of major changes needed in the near future at multiple levels—campus, system, state, and national—and to initiate and promote those changes through public policy.

This edition of *Exchanges* provides information and updates about primary activities of the grant, including:

- A project overview.
- *Policies in Sync*: A compilation of commissioned papers.
- What state legislators think about policy integration
- State technical assistance workshop.
- Status of tuition and fee policies in the states.
- Updates on the technical assistance states' activities.

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This issue of *Exchanges* was prepared by Demarée K. Michelau, project coordinator, WICHE, with contributions from Julie Davis Bell, NCSL, Cheryl Blanco, WICHE, Jacqueline King, ACE, Paul Lingenfelter, SHEEO, and David Longanecker, WICHE.

Alaska	Idaho	Oregon
Arizona	Montana	South Dakota
California	Nevada	Utah
Colorado	New Mexico	Washington
Hawaii	North Dakota	Wyoming

What is *Changing Direction*? A Project Overview

Changing Direction: Integrating Higher Education Financial Aid and Financing Policy examines how to structure financial aid and financing policies and practices to maximize participation, access, and success for all students. With funding support from Lumina Foundation for Education, the Western Interstate Commission for Higher Education (WICHE) embarked on a multiyear project with the goal of better, more informed decision-making on issues surrounding financial aid and financing in higher education.

Changing Direction provides a venue for policymakers and educators from all regions of the country to critically examine strengths and weaknesses of public policies and develop new models by looking at emerging trends, their potential impact on higher education, and the policy implications related to issues of financial aid, finance, cost of education, and access. While this necessarily involves all sources of assistance and financing—federal, state, local, and institutional—the project focuses on state policies and practices. It addresses current practices and policies, with emphasis on exploring innovative, creative, perhaps untested approaches to national- and state-level challenges. *Changing Direction* serves policymakers in the legislative and executive branches of state government and their staffs, higher education researchers, state executive agencies, governing and coordinating boards, educators, college and university leaders, and business and corporate leaders.

During the initial 18 months of the project, WICHE has engaged in a broad set of activities and involved key stakeholders. The remainder of this bulletin describes the work of this project and products that are available to others around the nation.

WICHE's primary partners in this initiative are the State Higher Education Executive Officers (SHEEO) and the American Council on Education (ACE). Both SHEEO and ACE, with its Center for Policy Analysis, have a long-standing reputation for high-quality work on a wide range of issues in higher education and a history of work on financial aid and financing issues. We also are collaborating closely with the National Conference of State Legislatures (NCSL). These partners expand and enrich the scope of the project, helping us to reach out to all 50 states and to national experts on these issues.

Policies in Sync: A Compilation of Commissioned Papers

It is difficult to understand why public higher education remains so fragmented today, given recent advances in public policy and public administration and the increasing sophistication of both executive and legislative policymaking. The relationship between institutional appropriations, tuition, and financial aid in sustaining successful access to higher education is obvious to most. Yet

virtually no states consider these policies as an integrated whole. At best the interrelationship is considered as an afterthought. Institutional appropriations garner the lion's share of attention and are seldom seen as a key determinant of a state's access agenda. Yet without adequate resources, institutions cannot serve well the increasing demand for higher education, particularly when that demand comes from a difficult-to-serve clientele. Tuition has not traditionally been valued for its critical importance as a revenue source, but rather is often considered primarily as a tool for sustaining affordability. And need-based financial aid is generally the afterthought, if it is a thought at all, despite research that demonstrates that student aid is the lynchpin to successfully financing access to success.

Furthermore, too often policymakers confuse the integration of policy with the control of policy. One key message of *Changing Direction* is that the three critical finance policies— appropriations, tuition, and financial aid—can be intentionally integrated, even if they are controlled by different policy actors. What is important is not *who* controls but *what* those in control are thinking about when they make decisions. If appropriations are constrained, it may be reasonable for tuition levels to increase to help offset the lost revenues. But if tuition increases, need-based financial aid must increase, just to stay even in assuring broad access to higher education. It really is that simple. Yet seldom is this recognized or considered in today's policy environment. Through *Changing Direction*, states are examining new ways in which they can build greater trust and appreciation between different policy actors so that they can count on integrative policies to complement each other.

One of *Changing Direction's* products is a compilation of commissioned papers that is an initial look into a system comprised of integrated financial aid and financing policies. Included in the publication *Policies in Sync: Appropriations, Tuition, and Financial Aid for Higher Education* are:

- "Financing in Sync: Aligning Fiscal Policy with State Objectives" (Dennis Jones, National Center for Higher Education Management Systems).

- "The Governance Context for State Policies on Appropriations, Tuition, and Financial Aid" (Kenneth Mortimer, National Center for Higher Education Management Systems).
- "Informing the Integration of Tuition, Student Financial Aid, and State Appropriations Policies" (Paul Brinkman, University of Utah).
- "Information Sources for Answering Key Financing and Financial Aid Policy Questions: Current Practice and Future Possibilities" (Paul Lingenfelter, SHEEO; Hans L'Orange, SHEEO; Christopher Rasmussen, University of Michigan; and Richard A. Voorhees, The Voorhees Group).

In "Financing in Sync: Aligning Fiscal Policy with State Objectives," Dennis Jones identifies the distinct elements of financing policy, describes alternative forms of these elements, and illustrates the alignment of these policies in the context of alternative state priorities. Financing policy— potentially the most powerful of the policy tools that states utilize to influence how institutions, students, and employers behave in ways consistent with broader public purposes—often is not wielded effectively and focuses on means rather than ends. Jones provides a useful guide for formulating financing policy that encourages educational outcomes that are consistent with economic benefits and enhanced quality of life for a state's citizens.

In "The Governance Context for State Policies on Appropriations, Tuition, and Financial Aid," Kenneth Mortimer examines the role of governance in the integration of financial aid and financing policies. Attempts to generalize about state-level governance often lead to lengthy discussions about how states vary in their political practices, policies, and values. Mortimer points out that there are, however, patterns and principles of governance in the states that are useful in describing the range of political behaviors that prevail. To describe these behaviors, he identifies the issues at stake, the actors who are (or ought to be) involved, the nature of interaction between the various levels in the state—system, institutional, and intra-institutional—and the stages of the decision-making process where these three questions are to be resolved. Four basic questions form the core of the essay:

STATE TECHNICAL ASSISTANCE HIGHLIGHTS

Changing Direction: Integrating Higher Education Financial Aid and Financing Policy examines how to structure financial aid and financing policies and practices to maximize participation, access, and success for all students. Funded by Lumina Foundation for Education, the Western Interstate Commission for Higher Education (WICHE) embarked on a multiyear project to promote more informed decision-making on issues surrounding financial aid and financing in higher education.

As part of *Changing Direction*, WICHE and its partners are providing five states—Arizona, Connecticut, Florida, Missouri, and Oregon—with targeted state technical assistance, examining each of their current policies and practices, and implementing innovative ways of improving the policymaking framework and decision-making involving tuition, financial aid, and appropriations. Case studies will provide more in-depth descriptions and analyses of each state's progress in aligning its policies. The following state highlights are brief descriptions of what each state has accomplished by participating in this important component of the project.

ARIZONA

Contact: Tom Wickenden, Associate Executive Director, Academic and Student Affairs, Arizona Board of Regents, 2020 North Central Avenue, Suite 230, Phoenix, AZ 85004. Phone, 602.229.2560; e-mail, tom.wickenden@asu.edu.

Arizona's *Changing Direction* activities are conducted by the Arizona Board of Regents (AZBOR). Arizona faces the perfect storm from three cresting waves—unprecedented increase in demand, an increasingly difficult-to-serve clientele, and no money to serve these new students. In addition, the way in which Arizona has organized its system of higher education presents a challenge. Until recently, the state's higher education institutions were organized under two statewide boards—AZBOR, which governs the three public universities, and the Arizona Community College Board, which coordinated the activities of the state's broadly accessible and highly regarded community colleges. The 2002 Arizona legislature abolished the Arizona Community College Board, so the colleges now operate separately under ten separate local boards.

Compared to other states, Arizona has almost no state-appropriated financial aid. For the three state universities, the legislature provides an appropriation predicated on enrollment and historical funding patterns

to AZBOR, which has then traditionally allocated these funds to the institutions. Until last year, state funding for the community colleges followed a similar process, though now each local board makes a separate request. The individual community college boards establish tuition.

Demographic trends and the impending fiscal crisis appear to have driven Arizona to initiate *Changing Directions*, Arizona's companion effort to the WICHE project. *Changing Directions* focuses on the major issues that future funding policies would have to address, including:

- ▶ An imperative that Arizona find a way to sustain access and improve student success in the future, despite financial challenges.
- ▶ A recognition that students would have to pay for much of the increasing costs, because state resources would be limited.
- ▶ Further recognition that the first two points could not be achieved without much more substantial attention at the state and AZBOR level to assure that adequate need-based financial assistance would be available.
- ▶ An appreciation that the institutions would be better able to address these issues if they had greater autonomy to operate within a "coordinated" system.

From this framework, the institutions developed specific proposals for moving this agenda forward, and the board's executive staff developed state-level frameworks for guidelines and accountability. In October 2002, the board received proposals from the three institutions. Although *Changing Directions* is still an initiative in process, much has already changed.

- ▶ Every regent now thinks almost automatically of the three financing policies—state appropriations for institutional support, tuition, and financial aid—as an integrated whole and understands that neither quality nor access can be maximized without blending these three together.
- ▶ The media has been remarkably supportive of the changes, even in the face of proposed substantial tuition increases.
- ▶ The new governor has been receptive to the changes, despite inheriting a board appointed almost entirely by her predecessor.
- ▶ The university presidents have taken bold steps to define unique and complementary missions for their institutions.

CONNECTICUT

Contact: Mary Johnson, Associate Commissioner, Finance & Administration, Connecticut Department of Higher Education, 61 Woodland Street, Hartford, CT 06105. Phone, 860.947.1848; e-mail, mkjohnson@ctdhe.org.

The *Changing Direction* project is housed in the State Higher Education Executive Office (SHEEO). Connecticut faces several challenges as it seeks to establish a coordinated set of policies on tuition, institutional support, and financial aid. The public institutions operate with a considerable amount of autonomy; the SHEEO agency, also referred to as the State Department of Education, has little direct authority over the institutions and operates only a small statewide grant program. The governor announced that he will not seek reelection after this term, and the legislature is concerned about rising tuition but is facing budget shortfalls and seems to have few tools at its disposal.

The four public systems (constituent units) in Connecticut—University of Connecticut, Connecticut State University, Community-Technical College System, and Charter Oak State College—operate autonomously and have the authority to establish their own tuition rates and retain their tuition revenue. The Board of Governors for Higher Education, which oversees the State Department of Higher Education, can only review these rates and recommend them to the legislature. In making this review, the board relies on a tuition policy that seeks to maintain a static student share of costs at 30 to 35 percent at the four-year institutions and 25 to 30 percent at the two-year institutions. This policy also prohibits tuition differentiation at the undergraduate level (except for out-of-state students) and limits annual tuition increases to 15 percent. Tuition rates in Connecticut are among the highest in the nation but are not out of line with rates in neighboring New England states.

Institutional support is provided through block grants to the four constituent units. Funding decisions are largely incremental; no enrollment or other formulas are used to establish appropriation amounts. The primary financial aid programs are housed within each unit and are funded by a mandatory 15 percent set-aside of tuition revenue. The Connecticut Aid to Public College Students program is a legislative match to this set-aside. Currently, the legislature has only funded two-thirds of this amount. The set-aside and match programs require only that institutions award these funds to students with demonstrated need. Within that broad mandate, the individual units are free to award the aid as they see fit.

The Department of Higher Education also operates a similar program for private institutions. The only statewide aid is a small (\$5.1 million) program in the Department of Education that awards grants to needy students with high academic merit.

Despite these structural constraints, the Board of Governors for Higher Education has established a Tuition Review Committee. As part of this process, the department also plans to review financial aid and institutional support policies. The establishment of this committee marks the seventh such formal review of tuition policy since 1980. Moreover, the board substantially revised its tuition policy twice during the 1990s. The committee's draft recommendations to the board of governors, governor, and general assembly call for clearly stated and measurable public policy goals served by state support for higher education and identification of forces driving higher education costs.

FLORIDA

Contact: Patrick Dallet, Deputy Executive Director, Council for Education Policy Research and Improvement, the Florida Legislature, Room 574, 111 West Madison Street, Tallahassee, FL 32399-1400. Phone, 850.488.7703; e-mail, dallet.pat@leg.state.fl.us.

Florida's *Changing Direction* activities are coordinated by the Council for Education Policy Research and Improvement (CEPRI). The passage of a state constitutional amendment in 1998 dramatically changed the education governance structure in Florida. By creating a single appointed State Board of Education, the state has adopted a seamless K-20 education system with actions such as the reorganization of the Department of Education, strategic imperatives to guide the new K-20 system, and the establishment of various councils and task forces, including a Higher Education Funding Advisory Council.

The Secretary of Education formed a Higher Education Funding Advisory Council immediately prior to engaging in *Changing Direction* with the following goals:

- ▶ Study and make recommendations regarding the demand for and funding of postsecondary education in Florida.
- ▶ Recommend improvements to the current system based on available data that will increase access, improve quality, minimize costs, and meet critical workforce objectives.

The advisory council's report addressed eight key issues—baccalaureate degree production, workforce education production, research and development,

flexibility of tuition and fees, prepaid tuition, financial aid, the Bright Futures Scholarship Program, and the K-20 accountability system, including performance-based funding.

The advisory council's full and minority reports can be found on the Florida State Board of Education's Web site at:

www.fldoe.org/higheredfundadvcounc/recommendations/HEFAC_FBOE_recs.pps and www.fldoe.org/higheredfundadvcounc/recommendations/MinorityReport.pdf.

A referendum passed by the voters in November 2002 established the Florida Board of Governors to coordinate the state university system, replacing in some respects the role of the former board of regents. However, since the governor, who firmly supports the previously enacted K-20 restructuring approach, appoints all members of the board of governors, it seems likely that the Florida State Board of Education will continue to be the most significant lay body involved in developing state education policy.

Florida is, like many other states, struggling with revenue shortfalls. However, it has unique characteristics—a rapidly growing population and higher education enrollment; a state goal of increasing the number of citizens holding bachelor's degrees; a history of low tuition; a popular, expensive lottery-funded scholarship program (Bright Futures Scholarship Program); and a constitutional amendment mandating class-size reduction. All of these factors add urgency and difficulty to the task of higher education policy development.

Through *Changing Direction*, Florida has made efforts to address three tasks:

- ▶ Assess the extent to which Florida's current major need and merit-based grant programs are achieving their statutory purposes.
- ▶ Determine the extent to which the state's current tuition, financial aid, and appropriations policies interact and either contribute to or detract from the goals of the K-20 system.
- ▶ Adopt and implement the tuition, financial aid, and appropriations policy changes, strategies, and action steps necessary to maximize student access and success while enabling educational institutions to maintain or achieve the highest quality of service delivery.

CEPRI has discussed state financing issues at several of its meetings. The council also has launched a study to examine the relationship between Florida's Bright Futures Scholarship Program and student postsecondary enrollment choices, and it has participated materially in

the State Board of Education's review of higher education funding policies.

MISSOURI

Contact: John Wittstruck, Deputy Commissioner of Higher Education, Missouri Coordinating Board for Higher Education, 3515 Amazonas, Jefferson City, MO 65109. Phone, 573.751.2361; e-mail, john.wittstruck@mocbhe.gov.

The Missouri Coordinating Board for Higher Education conducts the *Changing Direction* project. Missouri has a statewide coordinating board and several institutional boards. Established in 1974, the Coordinating Board for Higher Education is staffed by the Department of Higher Education and has a nine-member board appointed by the governor with the consent of the Senate. The board has statutory responsibility for the planning and coordination of public four-year institutions, community colleges, and private institutions; institutional budget review and recommendations; and program approval for all public institutions.

Missouri enjoyed relatively favorable state support of higher education and growth in state appropriations for higher education throughout the 1990s. However, as with all states, Missouri is experiencing a significant fiscal slump and weak economy, causing cut-backs in state appropriations and rising tuition.

Missouri's *Changing Direction* work focuses on activities that promote better alignment in thinking and policymaking regarding funding and student aid, and on the involvement of legislators and the governor in these conversations. As originally constructed, Missouri's goals were to:

- ▶ Increase understanding of the connections between state appropriations for higher education, tuition policies, and financial aid policies.
- ▶ Increase conversations and strategy development among the interested parties about how to structure these connections in order to maximize educational access and affordability.
- ▶ Implement the proposed strategies in ways that sustain accessibility and affordability, and enhance successful educational outcomes.

Four major developments have significantly impacted both the focus and the implementation of Missouri's work—legislative turnover; changes at the Missouri Coordinating Board for Higher Education; the establishment of the Missouri Commission on the Future of Higher Education and Economic Growth, a statewide advisory commission to address the challenges facing higher education and to improve the link between higher

education and economic growth in Missouri; and Missouri's selection to participate in a new initiative, the National Collaborative for Postsecondary Education Policy, a collaborative to help states improve higher education policies.

The first major activity of *Changing Direction* was a retreat of the Higher Education Coordinating Board held in August 2002, intended to be an opportunity to refocus on some key questions and recommendations adopted nearly a decade before. Following the retreat and after the elections, briefings on higher education financial issues were held with a few key legislators. In December, the governor announced the Commission on the Future of Higher Education and Economic Growth, which would provide a framework and structure to continue the work of *Changing Direction*. In January, a meeting was held with the governor and budget staff to discuss financial conditions of higher education in the state.

The commission met for the first time in April, and a second meeting will occur sometime this summer. The work of the Commission is scheduled to take about one year.

OREGON

Nancy P. Goldschmidt, Associate Vice Chancellor, Performance and Planning, Oregon University System, PO Box 1375, Eugene, OR. Phone, 503.725.5705; e-mail, Nancy_Goldschmidt@ous.edu.

The *Changing Direction* project is located in the Oregon University System (OUS). Higher education in Oregon is comprised of seven public universities, 17 public community colleges, 25 independent colleges and universities, and several proprietary institutions. Two governing bodies oversee the public sector: the State Board of Higher Education and the State Department of Education. Another prominent player is the Oregon Student Assistance Commission (OSAC) with its work in financing and financial aid activities.

Several concerns, a property tax limitation (Measure 5) to equalize funding in K-12 and other tax and spending limitations on nonstate funds led the OUS chancellor to apply for participation in *Changing Direction*. In the current economic downturn, while many states are increasing tuition to maintain quality programs, the Oregon legislature and governor appear committed to the idea that tuition cannot be increased beyond the levels approved in the 2001-2003 budget (about 4 percent and 3 percent each year). In a special election in January 2003, Oregon voters rejected Measure 28, which called for a three-year income tax increase. Prior to that, in fall 2002, the Board of Higher Education set caps for

emergency tuition increases at state universities if voters rejected the income tax surcharge.

Through *Changing Direction*, Oregon planned to build on the momentum from an earlier Financial Aid Commission report and from the current policy work being done in higher education governance and tuition pricing. Committed to an inclusive, broad-based effort, the chancellor's office sought participation from major players—community colleges, public four-year institutions, independent four-year colleges, the Oregon Student Assistance Commission, business community leaders, legislators, and the governor's office. In summer 2002, the chancellor's office initiated informal conversations with these sectors and established a state *Changing Direction* roundtable. Members of the roundtable held their first meeting in December 2002 to examine existing state policies and practices and consider how public policy should be crafted to maximize student access, participation, and success in higher education.

The next major step in the process developed during *Changing Direction's* State Technical Assistance Workshop held January 31-February 1, 2003. Throughout the workshop, the Oregon team met on several occasions to further discuss issues that emerged during the first roundtable meeting, while struggling to find an effective strategy to give the group a viable political foothold and a powerful message that would resonate with citizens and policymakers.

The roundtable met again in February 2003 to consider discussions from the State Technical Assistance Workshop, discuss the challenges facing the Oregon Opportunity Grant, develop strategies to address problems arising from the need to provide adequate coverage while serving a larger number of students, and focus on basic principles underlying the roundtable's work. A key outcome of this meeting was a list of "Guiding Principles," that included the following:

- ▶ Solutions to the current funding dilemma must be stable, predictable, and sustainable.
- ▶ Lower income students are the top priority for financial aid.

A future roundtable meeting will center on possible decisions that might flow from these principles.

- ▶ What decisions are made about appropriations, tuition, and financial aid?
- ▶ Who makes these decisions?
- ▶ What beliefs or assumptions are evident when these decisions are made?
- ▶ What policy goals underlie these decisions?

After discussing these four questions, Mortimer shows how they played out in one state, Hawai'i. He concludes with suggestions and raises issues to be resolved if the policy goal of a set of interrelated practices about appropriations, tuition, and financial aid is to be achieved.

Paul Brinkman's paper, "Informing the Integration of Tuition, Student Financial Aid, and State Appropriations Policies," focuses on how data are pivotal in catalyzing commitment to the goal of policy alignment and structuring and monitoring policies to achieve the goal. Brinkman recommends gathering a wide range of data to inform policy and suggests that the collection have four segments: contextual and background data, referential data, indicator data, and combined data for illustrative purposes. He provides specific examples of data and sources for each segment. For example, for "indicator data" he refers to home-state higher education performance measured over time and against performance elsewhere; these data are influential in building consensus around policy alignment or in shaping and monitoring policy. Brinkman lists several kinds of data relevant to various themes, such as access, attendance patterns, affordability, sticker price, price discounts, adequacy of institutional funding, and sharing the burden. He also underscores the importance of putting the indicators together to enhance their impact. He cites different ways of grouping indicators, such as the report card approach used in *Measuring Up 2002*, or a single table that shows performance on several indicators around a central issue. Brinkman concludes that maintaining a comprehensive data set is essential and that knowing which data to use when and for what end is critical when the purpose is to inform policy discussions.

The fourth paper also addresses data issues but from a different viewpoint. Paul Lingenfelter, Hans L'Orange, Christopher Rasmussen, and Richard A. Voorhees examine, from a data perspective, what

states need to know in order to design and implement policies related to appropriations, tuition, and student financial assistance. "Information Sources for Answering Key Financing and Financial Aid Policy Questions: Current Practice and Future Possibilities" focuses on different kinds of data and their sources as it addresses five questions:

- ▶ What is the capacity of the state to generate resources for higher education and other public services?
- ▶ What is the institutional capacity to provide quality postsecondary education to the state's citizens?
- ▶ What is the capacity of the state's citizens to contribute to the cost of successful participation in postsecondary education?
- ▶ What is the state achieving in terms of student participation and success?
- ▶ What is the payoff to the state from its investment in higher education?

The paper takes each of these questions, identifies a variety of data sources, and notes special considerations in responding to the questions. The authors conclude that while much of the data needed to speak to these questions are currently available from various sources, gaps exist in both the data available and in the way that data are used to create better information for decision-making.

Look for this publication at www.wiche.edu/Policy/Lumina/papers.htm.

What Do State Legislators Think about Policy Integration?

State legislatures are vital to integrating financial aid and financing policy. Not only do they control the purse strings, but they also influence tuition and financial aid decisions. NCSL conducted a legislative survey for *Changing Direction* to gain a better understanding of which decisions about tuition and financial aid are aligned. The survey also will inform the higher education community and others on the perspectives of legislators on policies and practices related to the integration of financial aid, tuition, and appropriations decisions.

Preliminary results indicate that respondents have a good grasp of the state higher education

polymaking process and their roles in that process. Legislators do not report a high level of coordination between the key state policymakers on tuition and financial aid issues, yet they are not overwhelmingly critical of the process in their states. While legislators suggest there may be too little alignment in the policy process, they feel hampered by the poor economy in their policy decisions. Survey results suggest that legislators would welcome the opportunity to consider more integrated approaches and policy options that are not so dependent on economic conditions. The full report will be available on the *Changing Direction* Web site in July 2003.

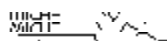
States Convene for a Technical Assistance Workshop

On January 31 and February 1, 2003, *Changing Direction* hosted a state technical assistance workshop. Approximately 40 participants and guests, including teams from the five project states—Arizona, Connecticut, Florida, Missouri, and Oregon—representatives from our partner organizations, and the Research Advisory Board, met in Phoenix to explore policy issues and compare approaches related to the integration of financial aid and financing policy.

The workshop was structured around the state teams and provided participants with ample opportunity to network and consult with other experts working with the project. State teams shared their work, and the authors of the four commissioned papers—Dennis Jones, Kenneth Mortimer, Paul Brinkman, and Paul Lingenfelter—presented their research and fielded questions. Participants also heard from Julie Bell, education program director at NCSL, about the legislative survey.

As a result of this workshop, team members gained a better sense of how their state activities compared with work in the other states, learned about other strategies that might be adapted to their states, and discussed how ideas from the commissioned papers relate to their particular challenges in aligning financial aid and financing policies.

The Western Policy Exchange is a long-term commitment by WICHE to support better informed decision making through collaboration with a wide range of partners. Updates on all WPE initiatives are available at www.wiche.edu or contact Cheryl Blanco, director of policy analysis and research at WICHE, 303.541.0224. *Western Policy Exchanges* is published by WICHE.



PO Box 9752
Boulder CO 80301-9752
303/541-0200

Status of Tuition and Fee Policies in the States

As part of *Changing Direction*, WICHE staff is conducting a comprehensive inventory of state-level tuition and fee policies, including statutes and board policy. Based on the information compiled, staff will draft short summaries of policy activity in each state.

The data and summaries then will be added to the State Policy Inventory Database Online (SPIDO) system (www.wiche.edu/Policy/SPIDO/index.asp). SPIDO, a joint project between WICHE and the Pathways to College Network, is designed to provide state and national policymakers, education leaders, practitioners, and education consumers with an inventory of state-level policies and resources in key policy domains related to student achievement, access, and success in higher education.

The final publication, to be released in summer 2003, will be an analysis of state tuition and fee policies and will complement other work being conducted by WICHE and SHEEO.

Looking Forward

Over the next several months, *Changing Direction* will be involved in what WICHE hopes will be productive and informative activities for all states interested in integrating financial aid and financing policy. These include:

- **A 2003 legislative session analysis:** WICHE is conducting a 50-state analysis of legislation related to financial aid and financing for higher education from the 2003 legislative session.
- **Institutional aid and retention:** *Changing Direction's* technical assistance states—Arizona, Connecticut, Florida, Missouri, and Oregon—as well as many others around the nation are very interested in information regarding institutional aid. WICHE has commissioned a study that explores how institutional aid is used by colleges and universities to enhance retention and persistence to graduation.
- **National meeting:** Contingent on future funding, *Changing Direction* will hold a national meeting focusing on the alignment of financial aid and financing policies to increase access and success for all students. This meeting is tentatively planned for December 15-17, 2003.